



Cyngor Bwrdeistref Sirol  
**MERTHYR TUDFUL**  
**MERTHYR TYDFIL**  
County Borough Council

---

**SCHOOL BUDGET FORUM**  
**Working Group**  
**Tuesday, 24<sup>th</sup> September 2024**  
**(Civic Centre)**

---

**NOTES**

**PRESENT:** Stuart James (SJ) (Afon Taf)  
Sarah Hopkins (SH) (Blessed Carlo Acutis)  
Owen Morgan (OM) (Cyfarthfa Park Primary)  
Simone Roden (SR) (Ynysowen Community Primary)

**IN ATTENDANCE:** Louise Ballinger (LB) (Education Accountant)  
Joanna Lewis (JL) (LMS Manager)  
Emma France (EF) (Clerk to the Forum)

No	Discussion/Action
1.	<p><b><u>Apologies</u></b></p> <p>Apologies for absence were received from Anthony Lewis and Rhiannon Stephens Davies.</p> <p>SR raised concerns over the dates for the forum being rearranged so often. Not appropriate to expect all parties continuously rearrange diaries at such short notice.</p>
2.	<p><b><u>Actual / Average Salaries</u></b></p> <p>JL presented members of the working group with a paper identifying the below for each school:</p> <ul style="list-style-type: none"><li>• School average</li><li>• Sector average</li><li>• Variance per Teacher</li><li>• Formula funding based on Average teacher salaries</li><li>• Proposed formula funding based on School average teacher salaries (excl. TLR)</li><li>• Variances for each school moving from average sector to average school funding</li></ul> <p><b>SJ: Will this pose significant additional work to LA?</b> JL: No additional work.</p> <p><b>SR: What do the calculations contain?</b> JL: SLT, and staff salaries excluding TLRs and HT.</p> <p><b>SJ: TLRs excluded but SLT included?</b> JL: Yes, that is correct.</p> <p>OM: Flaw in system, if school has more on leadership scale they are fully funded, but TLRs are not.</p>

No	Discussion/Action
	<p>SJ: Current information from WG is ALNCo who are currently paid on TLRs will moves to Assistant Heads, this will cost LA.</p> <p>SJ: As a school under the new system, a school with more Assistant Heads and less TLRs, they will increase their funding levels. If I moved all my current TLR holders to leadership scale I would receive additional funding.</p> <p>SR: There would need to be a limit, for example for a group 2 school we would fund 1 HT, 1DH and 1 AH. We could devise a model for each school group anything beyond that group would be self-funding.</p> <p>SJ: That would be complex in secondary sector and this system could be manipulated to increase funding. Would employ higher paid teachers to maximise funding over lower scale main scale teachers.</p> <p>SH: BCA would be very complex, our current staffing structure is very SL heavy, we are looking at staffing structure for when all campuses are on one site.</p> <p>SR: But all of that currently exists, we already do not fund TLRs, and we fund Assistant Heads, if schools had more Assistant Heads the average funding already increases. With the employment of experienced staff, you would not be making on the additional funding as you would be paying the staff at that level. They all already impact on the average salary.</p> <p>SJ: There is a loophole, schools can exploit. it would result in additional cost for LA.</p> <p>SR: The loophole already exists in current system. Employment of experienced staff or Assistant Heads already costs LA in the average costs. There is no difference.</p> <p><b>OM: Staffing changes regulate how will calculate.</b></p> <p>JL: We would have to pick a moment in time, for example a Date in November 2034 would dictate the funding for the 25/26 financial year.</p> <p>SR: In the current climate we can not have such winners and losers it is unfair to the schools that are so negatively impacted by current system. This would ensure all schools are funded fairly for the staff they employ. The current variances are unacceptable.</p> <p>OM: It would be helpful if we can see a trend over three years.</p> <p>SR: In addition, a model for leadership teams for schools based on school group.</p> <p><b>SJ: Can we also find out what other LAs do?</b></p> <p><b>OM: How would this work for the schools that have moved to a HLTA nursery?</b></p> <p>JL: Funding levels would be calculated on the PTR there would be no impact.</p> <p>SR: For example, if I had PRT 5.8 and employed 6 staff, I would be losing out but if I am funded on 6.2 and have 6 then I am gaining. That is how it currently works so there would be no change.</p>

No	Discussion/Action
	<p>JL: Yes, you are correct.</p> <p><u>Additional queries / Comments</u></p> <p><b>SR: Funding for PA?</b></p> <p>JL: Within current FA and estimates we have funded 4% the additional funding has been agreed by WG.</p> <p><b>SR: Will the 1.5% be funded in actual or average?</b></p> <p>JL: Funded on actual.</p> <p><b>Actions</b></p> <ul style="list-style-type: none"> <li>• JL provide group with 3 year tends.</li> <li>• JL provide model leadership structures based on school groups.</li> <li>• JL/LB speak to ADEW colleagues to find how other LA fund teachers.</li> </ul>
3.	<p><b><u>Special Tuition / PRU clawback</u></b></p> <p>Current arrangements for clawback are daily rate of AWPU.</p> <p>Consider 2 options:</p> <p>Option 1 AWPU +PDG Option 2 AWPU (-5%) + PDG</p> <p><b>SR: How are we currently funded for PDG?</b></p> <p>JL: Funding is always a year in arrears and is based on verified PLASC. Funding is £1,150 per true FSM pupil.</p> <p>JL: We would not want to take PDG funding for a pupil that the school has not yet received. It would be taken retrospectively.</p> <p>OM: If a child transfers to us mid-year and they are not on out PLASC we do not get funding for them.</p> <p>JL: The PDG funding would only be taken for pupils that the school has received funding for a year in retrospect.</p> <p><b>SR: What if a pupil is in PRU for four days a week and back with school one day, or a child in PRU transitions back to school over a period?</b></p> <p>JL: We would take a daily rate not the whole PDG for they pupil. As we currently-calculate the daily rate and charge the school based on the number of days the pupil in alternative provision. We would do exactly the same exercise for the PDG in retrospect.</p> <p>SH: Option 2 seems the fairest option for schools and LA.</p> <p>SJ: Yes, and it would need to be reviewed as currently in secondary once a child is in the PRU they very rarely integrate back to school. If that is to change, we would need to review the 5%.</p>

No	Discussion/Action
	<p>Agree to take option 2 to full forum with the PDG charged retrospectively for the number of days the child in alternative provision.</p>
<p>4.</p>	<p><b><u>CIPFA – Document</u></b>  SR queried when the CIPFA document would be available for School Budget Forum to consider.</p> <p><b>Q: What is the CIPFA document?</b>  SR: It is a document that outlines where the responsibilities lie for building repairs school/LA/ Diocese. I had a document many years ago from Joyce Slack, but my document does not match the document held by AL. It also needs to be updated in line with new builds and technologies</p> <p>JL advised it was currently under review to be brought to the School Forum.</p>
<p>5.</p>	<p><b><u>ICT – Sustainability Fund</u></b>  <b>SR: How do I know how much is in there and is it ringfenced for my school?</b>  JL: Speak to Phil Strand he will be able to advise on how schools can access it.</p> <p><b>SR: How long will we continue to put money into account?</b>  JL: I believe it is 5 to 7 years but again Phil Strand will be able to advise.</p>
<p>6.</p>	<p><b><u>Training – IR35</u></b>  <b>SR: As part of the SLA for creditors we agreed there would be training for Headteachers on IR35. This still has not been arranged.</b>  JL: I have contacted payroll on your behalf – they will be providing the training in Oct/Nov.</p> <p>The meeting closed – all thanked for their attendance.</p>